CREATING TEMPLATES FOR PIMS (PROSECUTOR INFORMATION MANAGEMENT SYSTEM)

There are 4 steps in the process of creating templates:
1. Create the boilerplate text that is always the same and save the file as a Rich Text Format (RTF) document.
2. Add the codes in the appropriate places so the system can replace the code(s) with the appropriate data from the PIMS database and save the changes (again, as a RTF file.
3. Upload the finished template to the system.
4. Test the template and make any necessary changes and upload the changes.

Step 1
Simply open a document that already exists or create it from scratch in your favorite word processor. Save it to a location on your hard drive that is easy to remember (i.e. C:\PIMS Templates)

Step 2
Insert the appropriate merge codes in places in the template that data should be merged from the database. You can 'hard code' certain things like County Attorney's names and court addresses if these do not change for this template from case to case. That simply makes the template easier to create. The merge codes that you can use in templates are contained in a template assistant program that you can use to easily get the correct code for the data element you want. The icon for the Template Assistant looks like the picture below:
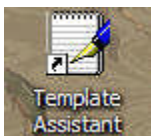

Double click this icon to launch the program.

To use the program you select the category, select the individual code you want, click on Copy and paste the code into the template where you want it to be (see figures below).

Dates can be configured to print out in several different formats. The default is 07/06/2007, but you can format it in any of the styles available on the Formatting tab.

Some codes (such as defendant name) have individual first, middle and last codes as well as a Full Name code. This is for convenience and can be done individually as well with the same result. If there are more codes that would be helpful to combine, please let UPC know and we'll modify the Template Assistant to include those changes.
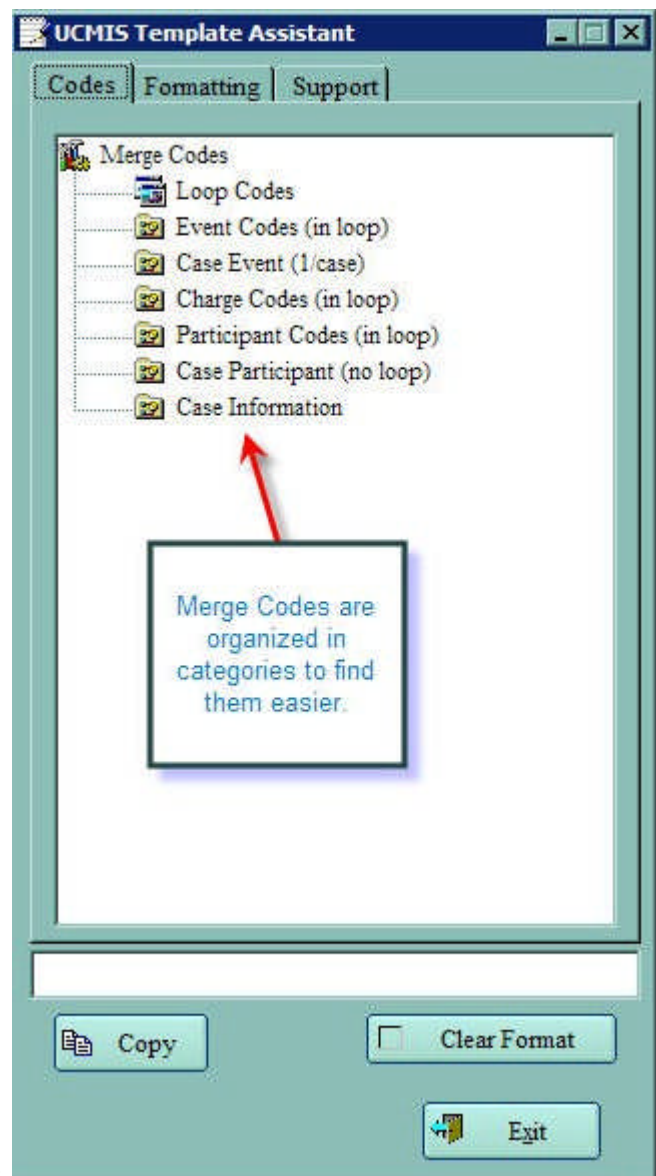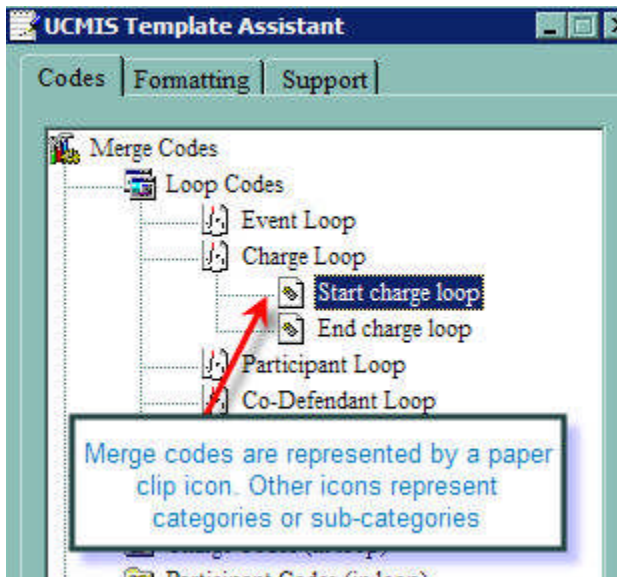
Loop Codes

To gather multiple records such as multiple counts, the system uses loop codes. These consist of a Start and an End loop code. These are all located under the Loop Codes category. The effect of these codes is to loop through the case record and gather all related data into one spot in the document. This allows us to merge all of the charges or witnesses into the same area of the template.
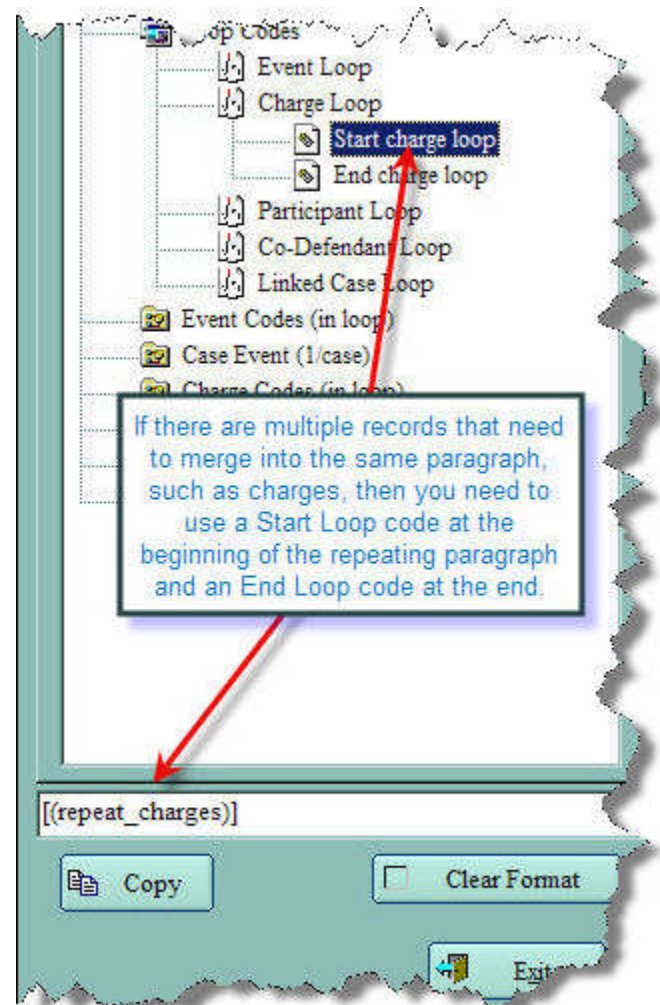
For participant loops, you put in a start and end loop, but when the document is merged, you do NOT select any participants in the list. The system, as currently designed, will see the loop and automatically gather ALL participants inside the loop block. If you select 2 or more participants, 2 or more documents will be created with all participants merged into the loop block. This is distinctly different from the way Prosecutor Dialog worked.
If you use participants outside of a loop, you must select the ones you want to be in the document when the merge is done. It that case, each selected participant will be on a separate page (please see example below).

For Events and Participants, there are different codes for inside loops and outside loops. So be sure to use the correct code.

One consequence of the way the merge system is designed is that you can NOT put case codes inside another loop (such as a charge loop). They will not be recognized if you do. For example, the following will not merge the defendant's name into the charge loop because of this restriction.

[(repeat_charges)]
Count [(chargeCount)]: [(filedOffenseDescription)], a [(filedOffenseClass)], in that [(defFirst.U)] [(defMiddle.U)] [(defLast.U)] [(defSuffix.U)] did [(filedPhrase)]
[(endRepeat_charges)]

This will work:
[(repeat_charges)]
Count [(chargeCount)]: [(filedOffenseDescription)], a [(filedOffenseClass)], in that the defendant did [(filedPhrase)]
[(endRepeat_charges)]

Formatting Dates

Dates can be formatted in several ways. To format a date, select the date code first, then click on the formatting tab and select the format you would like (see illustrations below).
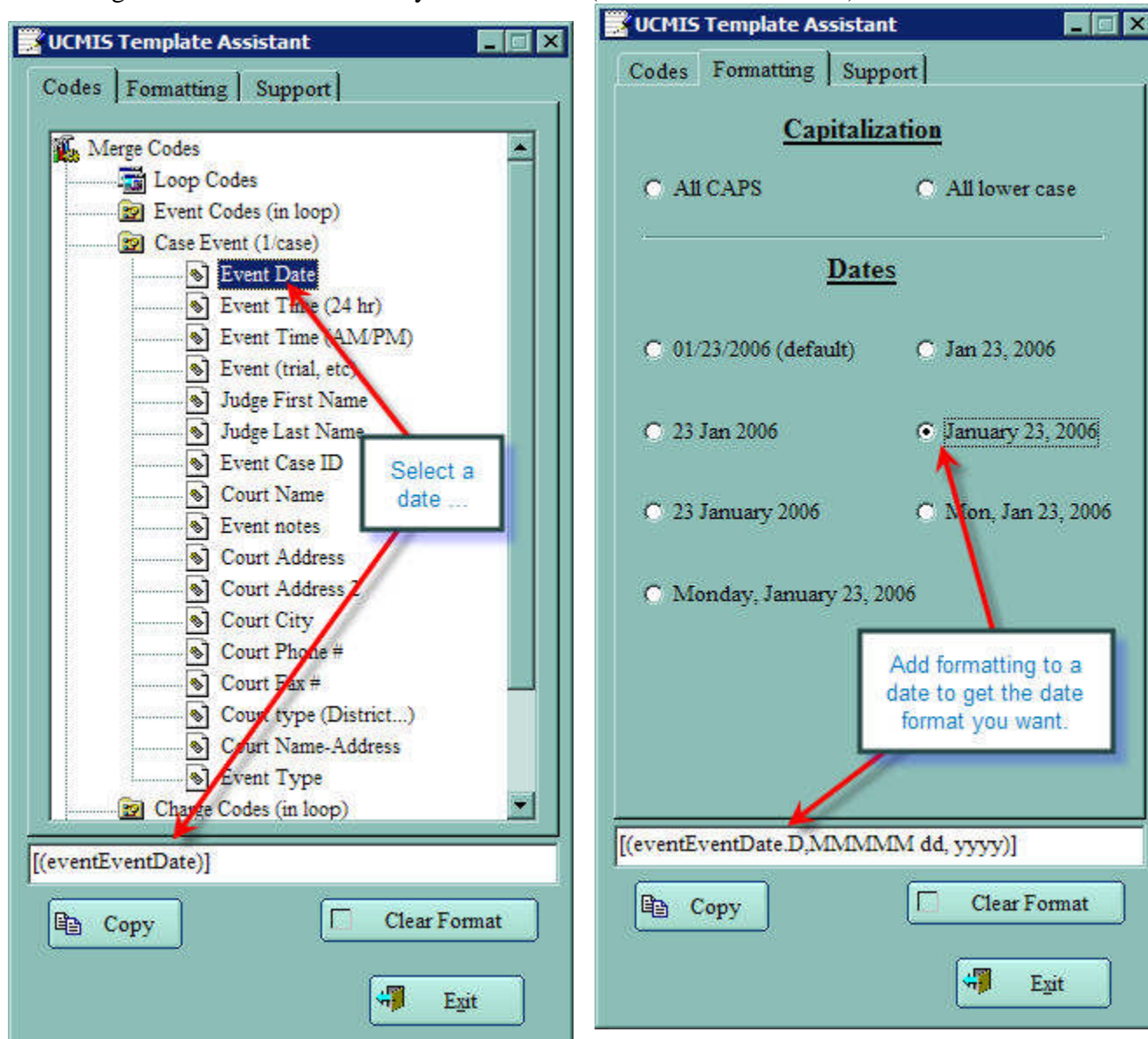
Copy the formatted date code into the template where you want it to go. This will work for all dates, including birth dates.

Keyboard prompts

The system treats all codes that it doesn't recognize as keyboard prompts and will prompt you to enter in a value. For example: Suppose you are building a search warrant template and want the user to enter in the values for what is being searched for and where, you could type in these codes:
[(Enter what is being searched for)]
[(Enter where you are searching)]

Case Screening - Case Documents ⓘ

Office Case No.: **UPC-Test2** | Court No.: **404040500** | Case Type: **FELONY** | Case Status: **OPEN**
Defendant Name: **Wilma Flintstone 1** | Case Judge: **LYNN DAVIS**

Record OrderToDismiss_UPC-Test2_07062007080410.rtf saved

The following are prompts that exist in the document. Fill in the values and hit generate to reparse the document and add these values.

Name	Value
Enter what is being searched for	
Enter where you are searching	

Rows 1 to 2 of 2   <<First   rev | Next>   Last> 10 20 30 40 All per page

Generate document

These are like keyboard prompts. Enter the value in the Value box and click on Generate document and the values you typed will be inserted into the document in place of the codes.

Header / Footer codes

There are NO special codes for headers or footers in templates. Just insert the codes you need where you need them in the template and it all works. Once you create the template and upload it, the system will recognize and use the template without any other steps to take.

Sample Template

See next page.

Gary K. Searle, 7620
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Tooele, UT 84074
Telephone: (435) 843-3120
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IN THE THIRD JUDICIAL DISTRICT COURT
IN AND FOR TOOELE COUNTY, STATE OF UTAH

                                    INFORMATION

                    Plaintiff,

              vs.

[(defFirst.U)] [(defMiddle.U)] [(defLast.U)]   Case No. [(courtCaseNum)]
[(defSuffix.U)]
[(address)]   Judge [(jpJudgeFName)]
[(city)], [(state)] [(zip)]   [(jpJudgeLName)]
DOB: [(dob)]
                                                     OTN: [(otn)]
                    Defendant.

        The undersigned [(jpAssAttorneyFName)] [(jpAssAttorneyLName)], under oath states on

information and belief that the defendant, [(defFirst)] [(defMiddle)] [(defLast)] [(defSuffix)],

committed the following crime(s):

[(repeat_charges)]

COUNT [(chargeCount)]: [(filedOffenseDescription)], a [(filedOffenseClass)], in violation of

Utah Code Ann. § [(filedStatuteCode)], as follows: That on or about

[(filedOffenseDateFrom.D.MMMMM dd, yyyy)], in Tooele County, State of Utah, the

defendant [(filedPhrase)] [(filedPhrase2)]

[(endRepeat_charges)]

        This information is based on evidence obtained from the following witness(es):
[(leadOfficerFName)] [(leadOfficerLName)] of [(agencyName)].

        DATED this ____ day of July, 2007.

                          Authorized
                          for presentment and filing:

                          By_____
                          [(jpAssAttorneyFName)] [(jpAssAttorneyLName)]

Participant loop example:

Addendum

RESTITUTION REQUEST

State of Utah vs.   [(defFirst.U)] [(defMiddle.U)] [(defLast.U)] [(defSuffix.U)]
Case No.: [(officeCaseNum)]

Victim Name/Address	Amount Requested	Notes	
[(repeat participants)] [(firstName)] [(lastName)] [(suffix)] [(address)] [(address2)] [(city)], [(state)] [(zip)]			
		[(notes)]	

[(endRepeat_participants)]

> When using a loop for participants, you DO NOT select participants from the list when doing the merge. ALL participants will be merged into the document. IF you select 2 or more participants, the merge will create 2 or more pages with ALL of the participants on each page.

Step 3

Once you have finished your template, you just need to upload it to make it available for everyone to use. The instructions for uploading are included in the Uploading templates to PIMS document attached.

Step 4

To make sure the document is working properly it is a good idea to test it. Search for a test case to use for your template and go to the document screen. Select your new template and create a document as usual. Inspect the result to make sure everything works as expected. If it doesn't, then edit the document and make necessary changes.